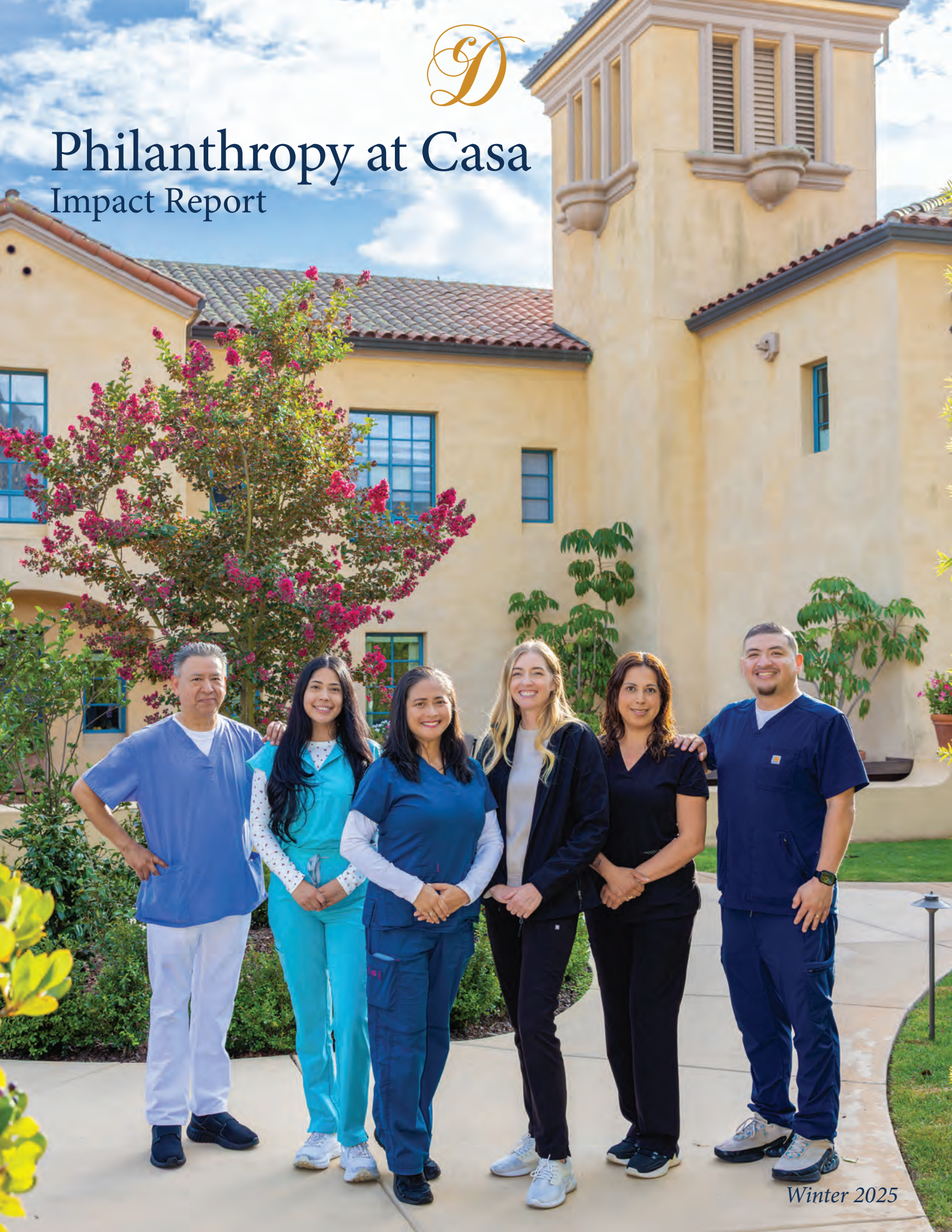




Philanthropy at Casa

Impact Report



Winter 2025

HISTORY OF PHILANTHROPY AT CASA DORINDA

1995

MEDICAL CENTER



Fundraising campaign launched by residents
\$9 million raised

2014

CASA ENDOWMENT FUND

Established through a matching gift resident-led campaign



2019

EMPLOYEE EMERGENCY FUND

Created and funded by residents



1988

BENEVOLENT CARE FUND



Established with a gift of \$40,000

1997

SCHOLARSHIP FUND



Established and funded by residents

2016

LEGACY CAMPAIGN

Launched for the Personal & Memory Care Center
\$9.5 million raised



2020



Casa Dorinda's Planned Giving program established
145 members

TODAY

The **legacy of giving** at Casa Dorinda is truly inspiring.

We are immensely grateful for the generosity of our residents and other stakeholders. Unlike our for-profit counterparts, **every dollar we receive goes directly back into Casa Dorinda**, ensuring we provide the highest level of care, services and amenities possible.

Your donations make a difference and strengthen our mission.

Cover photo: Healthcare Staff (left to right)

Mauricio Leon, Karen Gutierrez, Romma Murphy, Jessica Glance, Susanna Mora, Beto Aldapa

PHILANTHROPY AT CASA

FRONT COVER - HIGHLIGHTING OUR HEALTHCARE

Casa Dorinda's healthcare services are a defining strength of our community and a key reason many residents choose Casa as their home. Our dedicated staff provide exceptional, compassionate care, and it is no surprise that donations are often made in their honor.

Over the past year, we received \$137,000 in support of our future Healthcare Improvement Project, which will expand Personal Care/Assisted Living and revitalize our Medical Center. While final plans are currently being refined, we are grateful for the early philanthropic investment in this vital enhancement to our campus and the well-being of our residents.

WHERE THE NEED IS GREATEST/UNRESTRICTED GIFTS

"Nancy and I choose to make our gifts unrestricted because we trust the organizations we support and know they will utilize the funds where they are needed most. We were delighted to learn that our recent donation enabled the purchase of 10 new radios for Casa Dorinda's Resident Warden Program, led by Dr. Dave Williams and Leticia Ontiveros, Director of Security. This resident-led emergency response program plays a vital role in keeping our community safe, and we are proud to support its important work."

—Drs. Nancy & Jeffrey Kupperman



Leticia Ontiveros, Jeffrey Kupperman-MRA Board Member, Nancy Kupperman, Dr. Dave Williams (left to right)

Unrestricted gifts provide the flexibility to address immediate priorities and invest in opportunities that elevate our programs, services and campus.

Projects and Equipment Funded by Unrestricted Gifts in 2025:

Warden Radios • Housekeeping Area Enhancements • Resident Portal Upgrade • Vital Signs Machines
• Auditorium Lectern • Dining Services Food Delivery Cart

2025 Funds Contributed to Date: \$96,400 / 30 Gifts

2024 Funds Contributed: \$60,100 / 24 Gifts

PHILANTHROPIC INITIATIVES

CASA FUNDS

- Benevolent Care Fund
- Where the Need is Greatest
- Community Enhancement Fund
- Endowment Fund

EMPLOYEE SUPPORT FUNDS

- Employee Emergency Fund
- Scholarship Fund

PLANNED GIVING

- Sequoia Society



Thank you to John and Linda Seiter for donating funds for Medical Center jackets.

COMMUNITY ENHANCEMENT FUND HIGHLIGHTS



FITNESS CENTER ELLIPTICAL

“Fitness has always been an important part of our lives. We saw a need for a new elliptical machine at Casa and were excited to contribute to something that promotes health and wellness, and all residents would benefit from, including us!”

*—Mark & Chris Levine,
Casa Residents*

2025 Funds Contributed to Date: \$162,900 / 28 Gifts

2024 Funds Contributed: \$204,400 / 51 Gifts



COMMUNITY-WIDE PROJECTS:

- Music, Dance & Entertainment
- Dementia Training
- Electronic Healthcare Records Upgrades
- Fitness & Neuro Boxing Equipment
- Library Books

HEALTHCARE PROJECTS:

- Staff Relaxation & Wellness Room
- Medical Equipment
- Shower Room Upgrades
- Virtual Reality Program
- Observation Room Furniture

BENEVOLENT CARE FUND



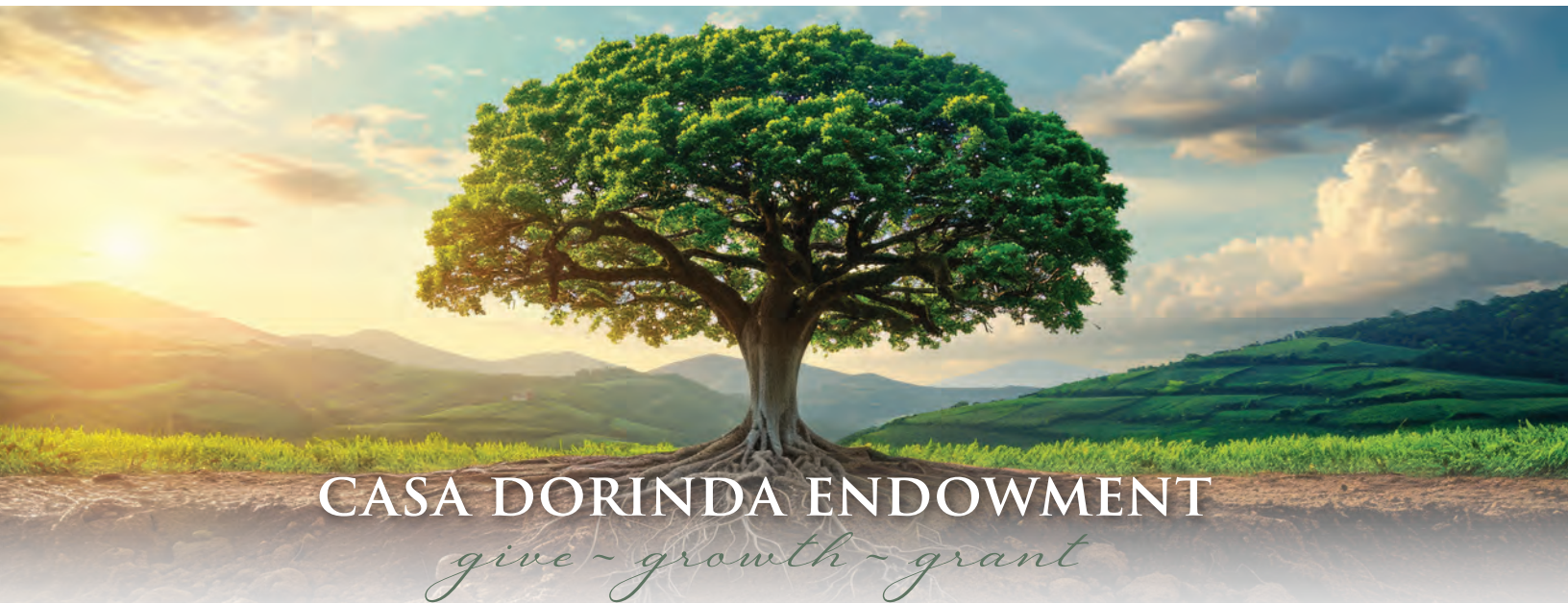
Residents who outlive their financial resources will always have a home at Casa Dorinda.

- Average number of residents who receive supplemental support: **2-4 per year**
- Average dollars spent each year: **\$170,000**

2025 Funds Contributed to Date:
\$3,600 / 5 Gifts

2024 Funds Contributed:
\$9,100 / 7 Gifts

BENEVOLENT CARE FUND BALANCE: \$770,000



Endowment gifts are invested for the future, funding projects that enhance the lives of our residents.

2025 Funds Contributed to Date: \$413,100 / 7 Gifts

2024 Funds Contributed: \$29,100 / 21 Gifts

ENDOWMENT FUND BALANCE: \$1,191,000 (includes guaranteed pledge of \$400,000)

SEQUOIA SOCIETY - PLANNED GIVING

- The Sequoia Society offers an opportunity to designate a planned gift of any amount to the fund(s) most meaningful to you. We have more than **145 members!**
- There are simple ways to designate your future gift without revising your estate plans, such as beneficiary designations through your **IRA, Donor-Advised Fund, Bank Account, or Life Insurance Policy.**
- The impact of planned gifts we have received includes support for the Center for Personal Care & Memory Care, the Employee Emergency Fund, Resident Benevolent Care and our Endowment.



Bequests/Planned Gifts received since Sequoia Society was established: \$1,040,000
Estimate of Future Gifts Casa will receive: \$8,000,000



SUPPORTING CASA DORINDA EMPLOYEES



“Thank you so much for approving my emergency grant request.

When unexpected challenges arise, finding a solution can be stressful

and overwhelming. Your support has allowed me to repair my car and keep up with my responsibilities without the heavy burden of financial worry. It is a huge relief to know this resource is available when we need it most. This is the second time in my nine years here that I have needed assistance, and both times I’ve been reminded how fortunate I am to be part of Casa Dorinda and a community that shows such genuine compassion for its employees. It’s not just the financial help—it’s the reassurance that we are not alone.”

—Cameron Vanetti, Technology Services



The Employee Emergency Fund provides tax-free grants of up to \$5,000 to staff members experiencing financial hardship due to an unexpected emergency.

- Emergency Categories: Medical, Dental, Home, Funeral Expenses, Transportation and Extreme Circumstances.
- The top two areas of need are Home – Rent/Mortgage and Transportation.
- To date, the EEF has been able to fulfill ALL eligible emergency grant requests.
- Nearly 300 grants have been awarded since the fund was created, totaling \$760,000.

To learn more about the Employee Emergency Fund, please contact Chair Nina Schooler at 805.969.8679.

EMERGENCY FUND IMPACT:

- 2025: 41 grants to date, totaling \$147,000
Average grant: \$3,600
- 2024: 46 total grants, totaling \$157,000
Average grant: \$3,400

2025 Funds Contributed to Date: \$71,000 / 98 Gifts

2024 Funds Contributed: \$156,000 / 78 Gifts

EMERGENCY FUND BALANCE: \$114,800

Employee Appreciation Fund

Thank you to all the residents who generously contributed over **\$597,000** to the 2025 Employee Appreciation Fund. Your support provided year-end bonuses to more than 250 staff members. While these gifts are not tax-deductible, your generosity means the world to them.

SCHOLARSHIP ANNUAL FUND

empower ~ elevate ~ educate

- Meets our immediate need to provide scholarships during the current application season.
- Employees, spouses, children or grandchildren qualify.
- The number of awardees continues to increase annually.
- The goal is to raise adequate funds to support all 2026 applicants.
- If funds are insufficient to meet the needs of applicants, we can draw 4.5% from our Endowment.

SCHOLARSHIPS AWARDED

2025: 45 scholarships, totaling \$217,500

2024: 36 scholarships, totaling \$185,000

AVERAGE SCHOLARSHIPS

\$7,500 4-Year Scholarship Awards

\$2,500 2-Year College/Vocational School



2025 Scholarship Awardees

2025 Funds Contributed to Date: \$189,300 / 98 Gifts

2024 Funds Contributed: \$68,600 / 54 Gifts

ANNUAL FUND BALANCE: \$221,800



“My goal has always been to work in sports. I’m now entering grad school to pursue a career in football operations—ideally as a director of player personnel or eventually in an NFL front office. Over the past year, I’ve taken on more leadership roles working with the Cal Poly football team. This scholarship eases financial stress and gives my family peace of mind. The continuation of my educational journey at USC wouldn’t have been possible without you.”

*—Hector Aldapa Morales Jr.
(Father is Hector Aldapa, Dining Services)*



SCHOLARSHIP ENDOWMENT

invest ~ support ~ educate

- Established in 1998 in partnership with the Scholarship Foundation of Santa Barbara.
- Provides long-term support and enables us to fund scholarships through investment earnings.
- Up to 4.5% of the Endowment may be distributed annually if needed. For example, with a balance of \$980,000, no more than \$44,100 could be used to offset Annual Fund shortfalls.
- The Scholarship Committee determines where contributions can make the most significant difference each year—whether in the Annual Fund or the Endowment.

**To learn more about the Casa Scholarship Funds, please contact
Chair Janet DeBard at 805.969.8660.**

2025 Funds Contributed to Date: \$21,300 / 18 Gifts

2024 Funds Contributed: \$116,700 / 38 Gifts

ENDOWMENT FUND BALANCE: \$980,000

THANK YOU TO ALL OUR 2024-2025 DONORS

Amy Adams
Dr. Albert & Toni Amorteguy
Doris Amory
Archer Family Foundation
Chuck Atkins & Kristin Demong
Sally Barden
Peter & Robin Barker
Peter & Robin Barker
Randy & Susan Bassett
Sally Beckham
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Peter & Linda Beuret
Bruce Bevan*
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Paul Blake & Mark Bennett
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Matthew Brown
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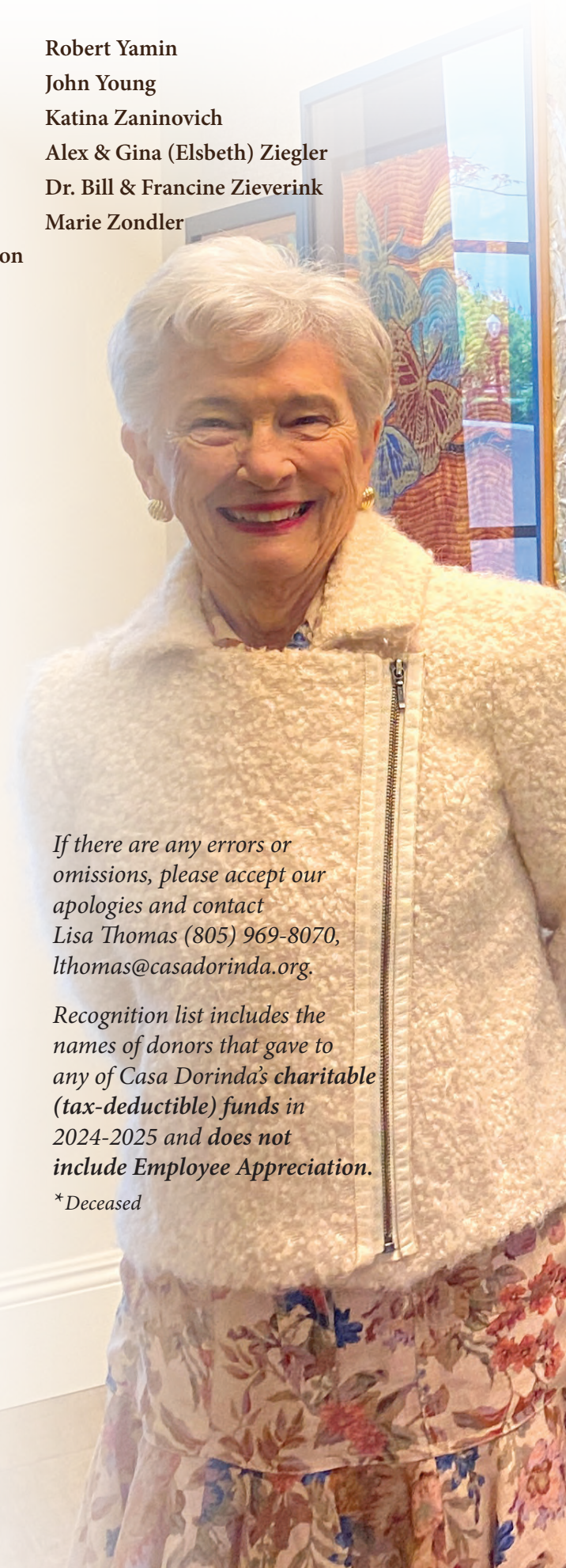
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Wendy Yager

Robert Yamin
John Young
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Alex & Gina (Elsbeth) Ziegler
Dr. Bill & Francine Zieverink
Marie Zondler

If there are any errors or omissions, please accept our apologies and contact Lisa Thomas (805) 969-8070, lthomas@casadorinda.org.

Recognition list includes the names of donors that gave to any of Casa Dorinda's charitable (tax-deductible) funds in 2024-2025 and does not include Employee Appreciation.

**Deceased*





SUPPORTING THE CALM AT HEART LUNCHEON

Casa Dorinda is a proud sponsor of CALM's mission to prevent childhood trauma and heal children and families.



Residents Joanne Rapp and Susan Gulbransen are passionate supporters of CALM and both served as past presidents of the Board of Directors. Susan's mother, Claire W. Miles was CALM's Founder in 1970. Both Joanne and Susan are members of Casa Dorinda's/MRA Philanthropy Committee and contribute to many other important causes in our greater community.

*Joanne Rapp & Susan Gulbransen
(left to right)*



YOUR GIFTS FURTHER OUR PHILANTHROPIC MISSION

- Enhance the Lives of Casa Residents
- Support and Lift Up our Employees
- Improve our Programs and Campus
- Bolster our Financial Strength

JOIN US

We invite you to become a loyal donor by giving annually to the fund(s) most meaningful to you.
Your donation can be directed to more than one fund.

WAYS TO GIVE TO CASA DORINDA

- MONTHLY STATEMENT: add your donation to your Casa statement (see enclosed envelope)
- IRA: make a qualified charitable distribution (contact your IRA custodian) and reduce your taxable income
- DONOR ADVISED FUND: request a grant to the Montecito Retirement Association through your DAF
- STOCK GIFT: donate appreciated stock, receive a charitable deduction and avoid capital gains taxes

Please see the enclosed envelope for more information on making a tax-deductible donation, or contact Lisa Thomas, Director of Philanthropy at 805.969.8070 or lthomas@casadorinda.org.

Every gift to Casa Dorinda makes a difference.

Thank you for your support!





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